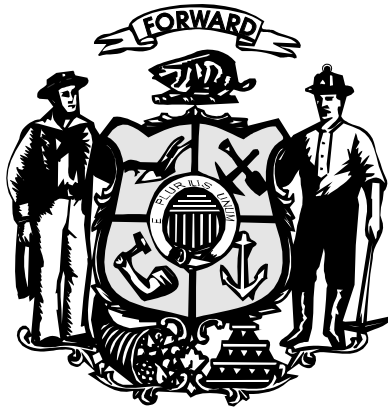


General Records Schedule

Forms Management Program and Related Records

August 2006



**For use by
State of Wisconsin Government Agencies**

RDAs Forms001-Forms009

PURPOSE

A General Records Schedule provides legal authorization to dispose of common records on a regularly scheduled basis. The purpose of this schedule is to:

- Provide agencies with uniform guidelines for the retention and disposition of common records;
- Ensure that agencies retain records as long as needed for internal administration, and to meet legal, fiscal, historical and other state of Wisconsin and federal requirements;
- Promote the cost-effective management of records; and
- Provide agencies with legal authorization to dispose of obsolete records on a regularly scheduled basis after minimum retention periods.

WHO MAY USE GENERAL SCHEDULES

General schedules apply to all Wisconsin state agencies. Any state agency may adopt any or all of the authorizations in any general schedules approved by the Public Records Board by opting in or out in whole or in part. See the related policies and procedures associated with opting in and out of general records schedules. These will be located on the Board's website:

<http://publicrecordsboard.wi.gov/>

RECORD SCHEDULES DO NOT REQUIRE CREATION OF RECORDS

It is understood that not all agencies may have all the records listed in this schedule. This schedule does not require records to be created by agencies, rather it provides guidance for actual records that are created or received by agencies.

RECORDS MANAGEMENT

Under Wisconsin law, each state agency is responsible for properly managing its records with approval from the Public Records Board. Proper records management can become complex, however, especially when: the same records are held by more than one department within a state agency, or multiple state agencies possess the same records. Accordingly, this schedule provides guidance for:

- A) Records management among the departments of a single state agency, all of which have custody of the same or similar records; and
- B) Records management among different state agencies, all of which have custody of the same or similar records.

Note: Although this schedule regulates only the official record for each state agency, guidance regarding the management of duplicate copies of a record is also provided in an effort to facilitate efficient records management.

- A. Records Management within an Individual State Agency:** For every record series, each state agency must identify the location of the official record. The official record is retained to satisfy records schedules approved by the Public Records Board. All copies of the official record that are maintained by different departments or programs within the same agency are classified as duplicates under the law. It is important to understand that duplicates of a record are not regulated by statute. Therefore, in the interest of efficient resource allocation, they should be retained only so long as needed in order to complete work projects and thereafter destroyed. [Wis. Stats. § 16.61\(2\)\(b\)](#). Also note that public records that have been retained beyond their approved retention period may have to be provided in response to relevant public records requests, audits and litigation. Duplicate copies of public records may also have to be provided, if available. Thus, it is imperative to destroy duplicates and expired records, which have outlived their functional life cycle.

Note: Because duplicates are not public records, do not send them to the State Records Center.

B. Records Management Among State Agencies That Have Custody of the Same Records:

Records management is also challenging when the same records are in the custody of more than one state agency. For example, accounting records are often created by state agencies and thereafter submitted for review and audit to the Department of Administration (DOA). Thereby, two state agencies possess the same records. In order to make this process easier to understand and manage, the following information is provided.

Requirement:

Each state agency must understand that if a record is created and thereafter submitted to another state agency for review, then under Wisconsin law both the creator and the receiver of the record must properly maintain the same record. [Wis. Stats. § 16.61\(2\)](#).

Guideline:

Each state agency has authority to recommend to the Public Records Board retention periods for every record, or record series, in the custody of that agency. [Wis. Stats. § 16.61\(4\)](#). In other words, just because two state agencies bear responsibility for properly managing the very same record, they are able to assign different retention periods for that record, so long as the Public Records Board approves.

Example:

If the Department of Workforce Development (DWD) created an accounting record and then submitted that record for review to DOA, then DWD and DOA would possess the same record. However, if DWD no longer needs to retain the record after it was transferred to DOA, then DWD could request permission from the Public Records Board to destroy its copy of the record upon transfer to DOA. In addition, DOA could request a different retention period for that record, in accord DOA's business function for the record.

Management of Records Within the University of Wisconsin System. The University of Wisconsin System bears a unique structure comprising fifteen distinct and autonomous educational institutions, all of which are governed by a single corporate board: The University of Wisconsin Board of Regents.

The Board of Regents' governance authority over these fifteen educational institutions is defined by statute: "The primary responsibility for governance of the system shall be vested in the board which shall enact policies and promulgate rules for governing the system...and promote the widest degree of institutional autonomy within the controlling limits of system-wide policies and priorities established by the board. [Wis. Stats. § 36.09\(1\)](#). Moreover, the Board of Regents may delegate authority to the each Institution within the University of Wisconsin System:

The board shall delegate to each chancellor the necessary authority for the administration and operation of the institution within the policies and guidelines established by the board. The board may also delegate or rescind other authority to chancellors, committees of the board, administrative officers, members of the faculty and students or such other groups as it deems appropriate." [Wis. Stats. § 36.09\(1\)\(f\)](#).

In accordance with these statutes, the University of Wisconsin Board of Regents is responsible for the proper management of the University's records. However, the Board may, and often does, delegate or rescind the administration and operation of records management to chancellors, committees of the board, administrative officers, members of the faculty, students, and other appropriate groups.

Therefore, it is important for University employees who manage University records to ascertain whether, and to whom, the Board of Regents has delegated the administration and operation of these records. Thereafter, the delegated authority shall properly manage public records on behalf of the Board of

Regents of the University of Wisconsin System and in accordance with records schedules, which have been approved by the Public Records Board.

Records Series, Titles, and Categories: Individual general schedules provide a listing of each record series, summarizing the retention requirements for official records and suggestions for working copies of the records. All items within a series relate to the same topic and have the same retention requirements. Each record series in a functional area is described in narrative detail, and may include lists of forms, reports and other items included within the series.

General schedules must be interpreted and applied to specific records. However, the titles of record series contained within general schedules may not be the exact titles used by an agency for their records or records series. Thus, if agency staff members would like guidance regarding a general schedule's application to their records, then please identify sources for advice within the section entitled: "For Additional Information and Assistance."

Electronic Records: General schedules cover records in all media, including records that are created or transmitted via electronic mail. Moreover, database systems contain inputs and outputs that are commonly understood to contain records, and the data elements in database systems themselves contain records that are subject to minimum retention and disposition requirements.

[Administrative Rule 12](http://publicrecordsboard.wi.gov/section.asp?linkid=1527&locid=165) Electronic Records Management-Standards and Requirements became effective May 1, 2001. This rule applies to all state record keeping systems. The rule and related information regarding records management for electronic records can be found at <http://publicrecordsboard.wi.gov/section.asp?linkid=1527&locid=165>. The purpose of this rule is to ensure that public records in electronic format are preserved and maintained and remain accessible for their designated retention period. Because of frequent technological change, including hardware and software obsolescence, agencies must take steps to manage and protect electronic records for as long as they are needed to meet business needs and protect the legal, financial and historical interests of Wisconsin citizens by preparing migration plans for electronic records.

Retaining Records: Records may be delayed from destruction, but only under the following conditions:

- Records are required for a financial or performance audit;
- Records are relevant to an actual or imminent legal proceeding; or
- A relevant public record request has been received and not completed.

Before disposing of a record, the office managing the record must determine if an audit, litigation, or public record request is pending. And notably, after a public records request has been filed, Wisconsin law forbids the destruction of any relevant record until the request is granted, or at least 60 days after the request is denied, and court orders may extend this time period. [Wis. Stats. § 19.35\(5\)](#). If agency staff members have questions regarding Wisconsin's Public Records Law, then the agency's legal custodian of records will provide further guidance.

Official records that are inactive, but not yet expired, should be transferred to a low-cost, record storage facility, such as the State Records Center.

Confidentiality of Records: Some records may contain confidential or restricted access records such as social security numbers. If in doubt as to whether or not a specific record is confidential, it is always a good idea to check with agency legal counsel. If your agency does not have a legal counsel, an Assistant Attorney General in the Department of Justice will provide advice.

Personally Identifiable Information (PII): Some records in this schedule contain personally identifiable information as defined by Wisconsin law. [Wis. Stats. § 19.62\(5\)](#). Public access to personally identifiable information is often restricted by law. Therefore, agencies should be aware of the requirements in Wisconsin Statutes, Chapter 19, as well as all applicable program specific laws or regulations. If in doubt

as to whether a specific record contains personally identifiable information, it is always a good idea to check with agency legal counsel. If your agency does not have a legal counsel, an Assistant Attorney General in the Department of Justice will provide advice.

DEFINITIONS

Official Record: The official record is the document that is most likely to be used for multi-agency audit purposes. This record is usually located in the central office of an agency. In decentralized organizations, the official record may be located in an institution, district, field office, cost center, or department.

Duplicate or Working Copies: All duplicate, working, and convenience copies of official records are classified as non-records under [Wis. Stats. § 16.61](#). Therefore, in the interest of efficiency, do not keep non-records longer than needed, and destroy them as soon as possible. It is also important to understand that under Wisconsin law, if non-records are not properly destroyed, then they must be provided to a requester in response to relevant: public records requests, audits, and litigation, even if the official record previously expired and was destroyed in accordance with approved records schedules. Finally, do not send non-records to the State Records Center because they will not be accepted.

Retention Period: The retention period is the minimum length of time an office must keep particular records. This is usually expressed in terms of years, months, days and may be contingent upon an event date or specification date that triggers the “clock.” Most often, retention periods are triggered at: creation(CR), event(EVT), or fiscal(FIS).

Creation(CR): The retention period starts when a record is created or received.

Event(EVT): The retention period is triggered or tied to event dates; thus, retention does not begin until the specified event occurs. For example, if a record series has a retention of EVT+ 1 year and the event is defined as the life of an asset, then all records in this category would be retained one year after the asset is sold, scrapped, or otherwise taken out of service.

Fiscal(FIS): This retention period is tied to the current fiscal year, and unlike CR and EVT retention periods, FIS record series are managed in blocks by fiscal year. For example, “FIS+4 years” indicates that records must be retained for the current fiscal year and four complete additional fiscal years.

Disposition: The final state in a record’s life cycle, involving: destruction or transfer to either the Wisconsin Historical Society or University of Wisconsin Archives for permanent preservation.

LEGAL TERMS

Public Records. Public records are defined as: “all...materials, regardless of physical form or characteristics, made, or received by a state agency or its officers or employees in connection with the transaction of public business.” [Wis. Stats. § 16.61\(2\)\(b\)](#).

Exceptions to Public Records. Public records do not include: (a) **Wisconsin Legislators:** records and correspondence of any member of the legislature; (b) **State Depository Library:** any state document received by a state document depository library; (c) **Duplicates:** duplicate copies of materials the original copies of which are in the custody of the same state agency and which are maintained only for convenience or reference and for no other substantive purpose; (d) **Library Materials:** materials in the possession of a library or museum made or acquired solely for reference or exhibition purposes; (e) **Unsolicited Notices:** notices or invitations received by a state agency that were not solicited by the agency and that are not related to any official action taken, proposed, or considered by the agency; (f) **Preliminary Materials:** drafts, notes, preliminary computations and like materials prepared for the originator’s personal use or prepared by the originator in the name of a person for whom the originator is working; and (7) **Routing:** routing slips and envelopes. [Wis. Stats. § 16.61\(2\)\(b\)](#).

Personally Identifiable Information (PII). This is information that can be associated with a particular individual through one or more identifiers or other information or circumstances. [Wis. Stats. § 19.62\(5\)](#).

Responsibilities of State Agencies. The term “state agency” is defined as: “any officer, commission, board, department or bureau of state government.” [Wis. Stats. § 16.61\(2\)\(d\)](#). And “all public records made or received by, or in the custody of, a state agency shall be the property of the state, and these public records may not be disposed of without written approval from the Public Records Board.” [Wis. Stats. § 16.61\(4\)](#).

FOR ADDITIONAL INFORMATION AND ASSISTANCE

Agency personnel should also consult with the following resource staff for additional information and assistance with records management concerns.

Records Officer: Each agency has a designated records officer who serves as liaison to the Public Records Board. The records officer is responsible for agency-wide records management planning, program development, and assistance.

DOA Records Management Section: The DOA Records Management Section provides free training sessions, as needed, on implementation of general records schedules. Further information regarding both training sessions and records management can be accessed by entering the search term “records management section” at the following website: www.doa.state.wi.us

Public Records Board: The board’s Executive Secretary can offer technical assistance and training to assist agencies with records management, including records scheduling and interpretation of schedules.

Archival Repositories: For some records series that have been appraised to have archival value, the disposition will indicate ‘transfer to an archival repository.’ An archival repository is responsible for processing the records, making them available to researchers, and providing for their safe-keeping and preservation. An official archival repository is one that has been reviewed and designated as such by the Wisconsin Public Records Board according to [Wis Stats. 16.61\(13\)\(b\)](#). In general, transferring to an archival repository means transferring records to either the Wisconsin Historical Society (State Archives) or the University of Wisconsin Madison Archives:

Wisconsin Historical Society: The Wisconsin Historical Society (WHS) assists agencies with records management, particularly in identifying the small percentage of records that have historical value.

University of Wisconsin Institution Archives: University of Wisconsin Institutions have delegated authority to operate archives for historical institutional records. Often, the University of Wisconsin archives also function as the focus for records management related activities on the campus.

FORMS MANAGEMENT PROGRAM RECORDS and RELATED DOCUMENTS

Forms management is the application of accepted practices and standards used to manage the analysis, standardization, design, creation, revision, printing, monitoring, and use of official agency forms.

[Wis. Stats. 16.97\(5s\)](#) - "Forms management" means the system of providing forms to accomplish necessary operations efficiently and economically, including analysis and design of forms, improvement of methods of procurement, distribution and disposition of forms and improvement of methods to keep to a reasonable level the public's duty to report. "Forms management" includes the elimination of unnecessary forms and of unnecessary data collection and standardizing, consolidating and simplifying forms and related procedures.

[Wis. Stats. 16.97\(5p\)](#) - "Form" means any written material, by whatever means printed, generated or reproduced, with blank spaces left for the entry of additional information to be used for the purpose of providing information, collecting information or requiring action in any transaction involving this state.

FORMS001 Form History Files

A history of authorized agency forms (and manuals, newsletters, brochures and publications, as defined by agency policy) created and assigned an official identification number as part of the creation, design, revision, printing, and use of each form in all media. The history file typically contains copies of finalized or printed versions of the form. It also may include development information, change requests received from users, route slips, rough drafts, copies of data input screens, and printing specifications and orders, format samples of each approved version and sponsor/program managers approvals. The history of each form, manual, brochure, newsletter and publication is used to track activities, answer inquiries, and conduct research.

Retention/Disposition: EVT + 3 years and destroy. Event is after obsolete.

Confidential: No

PI Information: No

Administrative Note: This retention applies to the official copy. The Agency Forms Manager/Officer maintains the official copy. If forms users/owners maintain any working copies of forms, they should only be retained as long as needed for reference.

Purging of some material, such as routing slips, old print orders, rough drafts, etc., throughout the life of the form may also be done, as necessary to keep the size of the file manageable.

Some agencies may have a legal obligation to keep active and obsolete history files permanently. If so, an agency specific RDA should be developed.

FORMS002 Forms Inventory Records

Manual and automated systems containing a running inventory of each form. The inventory system may include, but is not limited to, information on revision dates, storage locations, orders received, orders filled, minimum reorder points and current stock on hand. The inventory record is used to document the creation, revision and use of forms, in addition to running reports for reorder, audit, or risk management purposes.

Retention/Disposition: FIS + 4 years and destroy.

Confidential: No

PI Information: No

Administrative Note: Running inventories are continually updated. At a minimum, a copy of the current fiscal year and previous 4 fiscal years should be maintained before purged or destroyed.

FORMS003 Form Request Orders

Records used to fill requests for forms to users and the general public. These requests may be received via order forms, e-mail, website request screens, or letters received via mail. These forms are used to key the data into an automated forms inventory system. They may be used to verify completion of requests and generate usage or reorder reports.

Retention/Disposition: EVT + 1 month and destroy. Event is after filled, keyed and verified.

Confidential: No

PI Information: No

FORMS004 Forms Inventory Reports

Various reports generated from the inventory system. Examples of reports that may be generated include:

- a. Minimum reorder report - used to notify Forms Manager, Officer, or designee to reorder form. Note: These reports may become part of the forms history file.
- b. Forms orders filled for certain users or functions.
- c. Fiscal year end report needed for audit or risk management reporting.

Retention/Disposition: EVT + 0 and destroy. Retain until obsolete or superseded by updated report.

Confidential: No

PI Information: No

Administrative Note: Ensure a physical inventory reconciliation has been done prior to destruction. If reports are filed as part of another records series, their retention is based on retention for that record.

FORMS005 Forms Management Program Subject Files

Records used to support the administration of an agency forms management program, consisting of correspondence, memoranda, reports, guidelines, articles, vendor literature, studies, forms training materials (curriculum, schedules, etc.), and related records on forms design, design standards, management, and control.

Retention/Disposition: EVT + 0 and destroy. Event is until obsolete or superseded.

Confidential: No

PI Information: No

Administrative Note: These records have no legal or fiscal value. Many are used for informational purposes only. Agencies may maintain files by subject, fiscal year or calendar year but should dispose of all obsolete records at regular intervals. This item should not be used for records, covered by other items in this general schedule or other statewide general schedules.

FORMS006 Forms Workgroup/Committee Minutes

Agency forms workgroup or committee minutes and agendas regarding discussions about forms policies, budget, projects, promotional activities, training, etc.

Retention/Disposition: Official copy – Retain 5 years and destroy.
Other Copies - Retain until no longer needed and destroy.

Confidential: No

PI Information: No

Administrative Note: The agency forms manager/officer retains the official copy. Committee members get copies and only need to retain them until no longer needed. There is no legal or audit requirement to retain these records, however, there may be a historical or research need identified by the agency.

FORMS007 Forms Catalog/Listing

Office catalog of agency forms, which is used as a primary reference tool to learn when a form was created, last revised, or became obsolete. Catalog/listing can be sorted and printed in an alphabetical or numeric order. Catalog may be retained online and backup copies to other electronic media.

Retention/Disposition: EVT + 0 and destroy. Event is until superseded.

Confidential: No

PI Information: No

FORMS008 Forms Management Policies, Procedures and Planning Documents

Agency forms management manuals, policies, processes, procedures and planning documents developed to help staff manage the agency forms management records.

Retention/Disposition: EVT + 3 years and destroy. Event is when obsolete or superseded.

Confidential: No

PI Information: No

FORMS009 Process/Business/Systems Analysis Project Files

Process and Business Analysis flowcharts, recommendations, and notes collected during analysis. Analysis should include all forms in the process.

Retention/Disposition: EVT + 3 years and destroy. Event is after completion of project.

Confidential: No

PI Information: No

Appendix 1

RDA #	Title	Retention	Disposition	Comment
FORMS001	Form History Files	EVT + 3 years	Destroy	Event is after obsolete
FORMS002	Forms Inventory Records	FIS + 4 years	Destroy	
FORMS003	Form Request Orders	EVT + 1 month	Destroy	Event is after filled, keyed and verified
FORMS004	Forms Inventory Reports	EVT + 0	Destroy	Event is until obsolete or superseded by updated report
FORMS005	Forms Management Program Subject Files	EVT + 0	Destroy	Event is until obsolete or superseded
FORMS006	Forms Workgroup/Committee Minutes	Official Copy - 5 years Other copies - EVT + 0	Destroy	Event is until no longer needed
FORMS007	Forms Catalog/Listing	EVT + 0	Destroy	Event is until superseded
FORMS008	Forms Management Policies, Procedures and Planning Documents	EVT + 3 years	Destroy	Event is when obsolete or superseded
FORMS009	Process/Business/Systems Analysis Project Files	EVT + 3 years	Destroy	Event is after completion of project

Appendix 2: Agency Agreement to Use General Schedule-New Policies and Procedures

Currently when the Public Records Board (PRB) approves a general records schedule the implementation by each state agency is assumed. This new policy, effective March 1, 2006 requires an affirmative act on the part of agencies to adopt for their internal use General Records Schedules (GRS) approved by the Board.

Policy Statement

General records retention schedules, GRS, are a mechanism for systematic retention and disposition of similar types of records across State government. GRS's eliminate the necessity for agencies to develop and seek approval of their own retention schedules. They lend consistency to record keeping across state government and provide assurance of accountability to the public. The PRB supported the development of and approved several GRS in several functional areas. This policy statement outlines a process that State agencies must use to adopt for their internal use any GRS approved by the PRB.

Any state agency (including UW System Administration and all UW campuses) may adopt any or all of the authorizations in any general schedules approved by the PRB and identified for use by state agencies provided the agency head or deputy and agency records officer notifies the Board in writing of the intent to use the schedule. Adopting a Board approved GRS means that the agency agrees to implement the retention and disposition recommendations noted for each records series in the particular GRS. State agencies must choose one of the following options with regard to the adoption of GRS's:

- 1- **Opt in** Agreeing to opt in means the state agency agrees to use the recommendations noted in the GRS for its records.
- 2- **Opt in with revisions** State agencies choosing this alternative would agree to the recommendations of the GRS, but they will submit to the PRB a list of records series with retention and disposition recommendations that vary from the GRS. It is recognized that State agencies may have in some areas the need to retain items for a different period of time than that recommended by the GRS.
- 3- **Opt out** If a State agency opts out of adopting a GRS, it must then within six months in accordance with Wis. Stat. 16.61 provide specific retention schedules for any record it maintains in the functional area covered by the GRS.

State agencies should be aware that current law ([Wis. Stat. 16.61](#)) requires authorization of the Board to destroy any state agency records. Therefore if a state agency chooses to opt out entirely or partially of any existing general schedule, they may not destroy any records until separate records disposition authorizations (RDA's) are prepared by the state agency and approved by the Board.

Implementing General Records Schedules

After adoption and notification, state agencies may use the identified general schedule for any applicable records in its custody. This means that following notification, records may be disposed on a continuing basis, provided that the minimum retention time period identified in the schedule has been met. If a general schedule identifies a record series with a disposition of transfer to an archival repository, those records must be offered to the archival repository rather than being destroyed. Disposal or transfer of records is contingent on record destruction restrictions contained in [Wis. Stat. 19.35 \(5\)](#) (Open Records Law). No records may be destroyed if litigation or audit involving these records has commenced.

State agencies may discontinue the use of all or portions of any general schedule, but the agency records officer must first notify the Board of the discontinuance. When an agency discontinues use of a general schedule (in whole or part), the records controlled by the applicable record series may no longer be destroyed or transferred until separate records disposal authorizations are prepared by the state agency and approved by the Board.

Discussion

The Board is implementing this new requirement to strengthen state agency compliance with records retention law and to increase efficiency in state records management. The requirement will be implemented on a “day forward” basis as the Board approves either new or updates to existing general schedules.

An approval form will be issued along with each approved general schedule. The form will identify the functional area (for example Fiscal and Accounting; Personnel; Information Technology) covered by the general schedule and have check boxes for the agency to affirm their intent to opt in to the entire general schedule, opt in with revisions or opt out all together. The form will have signature blocks for the Agency Head, Agency Records Officer, Board Executive Secretary and the State Archivist.

Agencies should not opt out of a GRS because your agency does not create or use all the types of records contained in a schedule. Agreeing to follow the record retention and disposition requirements within a GRS does not obligate an agency to create records. It only requires that records be retained in accordance with the retention time periods and dispositions if such records exist.

Since the general schedule contains the minimum time periods, the most likely reason that an agency will not use the time periods is because they have a business need to keep the records longer. The Public Records Board will not approve retention time periods in separately submitted record schedules shorter than those contained in the general schedule.

If a record series in a general schedule is identified as having potential historical value, that determination stays with that record series if an agency chooses not to adopt the general schedule. This means that if an agency proposes a separate schedule they should assume that the disposition for the series will be transfer to an archival repository, rather than destroy.

Agency compliance with records retention requirements is existing state law. Therefore agencies that choose to opt out of all or parts of a general schedule may not destroy any records that are controlled by these record series until the agency has prepared separate records disposal authorizations which are then approved by the Public Records Board.

For More Information Contact:

Executive Secretary
Public Records Board
608 266-2770
March 29, 2006

Notification of General Records Schedule Adoption

Schedule Title: _____ Date: _____

Instructions:

Complete and send the original and 2 copies to: State Archivist, Wisconsin Historical Society (WHS), 816 State St., Madison, WI 53706.

- Do not opt out of a record series because your agency does not create or use these types of records. Signing the form does not obligate an agency to create records. It only requires that records be retained in accordance with the retention time periods and dispositions if such records exist.
- Please attach a brief narrative explaining your rationale for opting out of each record series. Examples: Increased retention needed for business purpose, or federal or state regulation requires longer retention. When a separate schedule is prepared, identify that the record series is in lieu of the general schedule and cross reference the specific series.

NOTE: Destruction or transfer of records is not permitted until this form is signed by the WHS and the Public Records Board.

State Agency: _____

Address: _____

This is to notify the Wisconsin Historical Society and the Public Records Board that the state agency named above has reviewed the general records schedule.

Check appropriate box(es):

☐ The State Agency adopts the entire schedule.

☐ The State Agency opts out of the entire schedule.

(All applicable records disposition must cease until separate RDAs are developed and approved by the Public Records Board.) Please attach a brief narrative explaining your rationale.

☐ The State Agency opts out of the following record series.
Please list identifying the specific RDA numbers and titles:

In those areas not covered, all records disposition will cease until separate RDAs are developed and approved.

Agency Head/Deputy Signature	Date Signed
Agency Records Officer Signature	Date Signed

The Public Records Board and Wisconsin Historical Society acknowledge your Notification of Adoption. You are hereby authorized to retain, transfer, and dispose of records as indicated on the schedule.

State Archivist Signature	Date Signed
PRB Executive Secretary Signature	Date Signed